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**Local Government Retention Schedules**

- ▶ County /Local General Retention Schedule (GEN) – NEW
- ▶ General Retention Financial (COGRFIN) – DELETED
- ▶ County Auditors' Retention Schedule (AU) – REVISED
- ▶ County Clerks: Miscellaneous Records (CL) – REVISED
- ▶ County Coroner: General Retention Schedule (CO)
- ▶ County Recorders (RE) – REVISED
- ▶ County Treasurers (TR) – REVISED

The local retention schedules are located at:  
<http://www.in.gov/icpr/2739.htm>

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## County/Local General Retention Schedule (CLGRS)

This Retention Schedule is divided into five (5) categories:

1. Administrative
2. Accounting and Finance
3. Personnel
4. Publications and Reports
5. Audio, Video and General Media

Retention periods for some records are increased in length of time to be retained because current Indiana Code statute of limitations have been applied to all records on this schedule.

## Local Government General Retention Schedule

- ▶ Administrative – Minutes; policy, general, legal, files; retention varies from 3 years to permanent.
- ▶ Accounting – Receipts, invoices, checks, bank statements, payroll records, bonds, contracts; varies from 3 years to permanent
- ▶ Personnel – Personnel files, medical records, applications. Varies from 3 to 75 years (excludes payroll records– see accounting)
- ▶ Audio, Video & General Media – photographs, etc. – Does not apply to libraries

## Public Library Retention Schedule (refer to actual schedule for specifics)

- ▶ Library Ledgers – financial and appropriation ledgers and general fixed asset and capital asset ledgers – permanent
- ▶ Patron and Reciprocal Library Card applications – 3 years after patron is inactive.
- ▶ PLAC and Non-Resident applications – 3 calendar years after SBOA Audit.
- ▶ ILL files – no fees, 30 days after return of item(s); with fee 3 calendar years after SBOA audit.
- ▶ Computer Use Signup Sheets and Logs – destroy 90 days after date of use.
- ▶ Program Registration – destroy each April for previous calendar year.

## Permanent Records

- ▶ You can only destroy or transfer these records if you MICROFILM the original records.
- ▶ If you digitize **Permanent** records, or they are submitted electronically, they **MUST** also be converted to microfilm.
- ▶ Digital records are **NOT** recognized as **Permanent** format to preserve information.

**It's illegal to destroy public records if you do not have an approved records retention schedule or special written permission from ICPR.**

**A public official may not mutilate, destroy, sell, loan, or otherwise dispose of any government record, except under a retention schedule or with the written consent of the commission (on public records). IC 5-15-5.1-1-14**

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## Use of Current Forms

- ▶ **Notice of Destruction, State Form 44905** – This form is used as notification to destroy all records that are on an approved Retention Schedule, have been kept for the length of time required on this schedule, and are not a Permanent record.
- ▶ **Request for Permission to Destroy or Transfer Certain Public Records (PR-1), State Form 30505**  
Until a Retention Schedule has been approved for use by your office and adopted by your County Commission of Public Records, or if any record is not listed on an approved Retention Schedule, this record can only be destroyed by completing a Request for Permission to Destroy or Transfer Certain Public Records (PR-1), State Form 30505, and then obtaining approval of the County Commission of Public Records at their meeting.
  1. Request to destroy previously microfilmed originals;
  2. Request to microfilm and destroy; 3. Request to transfer to.

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## Jefferson County Courthouse Fire May 2009



## State Sponsored Workshops

- ▶ This summer, ICPR and the SHRAB will be offering a series of records management workshops across Indiana:
  - Preservation of records
  - Archival Basics
  - Electronic Records
  - Government records
- ▶ IPER Training –
  - Intergovernmental Preparedness for Essential Records this spring – webinars

## Grant funding – Digitization

- ▶ This Spring, ICPR and the SHRAB will be offering mini-grants to digitize certain local records:
  - Civil War related records
  - Territorial and early statehood records
  - Government Records related to slavery, negro and mulatto registers
  - Indenture records

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## ICPR Local Records Website

<http://www.in.gov/icpr/2359.htm>:

### Specific to County/Local Records

- Records Retention Schedules
- Example of County E-Mail Retention Policy (Bartholomew Co.)
- Guide to Preservation and Destruction of Local Public Record
- Forms (for county/local records)
- County and Local Government Links

### ▶ General Records Management

- What is a Retention Schedule?
- Publications
- Laws
- Links
- Records Disaster Prevention and Reporting

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